

# **SiteManager** **Training Manual**



Module E  
Chapter 2

**Change Orders**

**Section A**

## **Viewing a Change Order**

Student's Version

Indiana Department of Transportation

March 2009, Version 3.9a

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# **Change Orders Overview**

This section summarizes the topics necessary to create, review, print, approve, reject and track a change order.

## **CREATING CHANGE ORDERS**

There are five types of change orders that will be utilized by INDOT. The modules for creating these change orders are listed below.

**Overrun/Underrun Change Order**

**Extra Work Change Order**

**Time Adjustments Change Order**

**Zero Dollar Change Order**

**Final Quantity Change Order**

Not to be utilized by INDOT

## **MISCELLANEOUS**

After the change order is approved, it is complete.

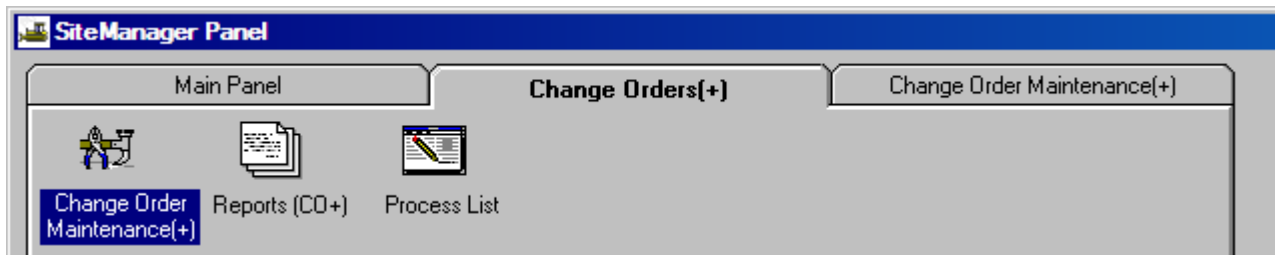
Items may now be posted using a **Daily Work Report (DWR)**.

# Viewing a Change Order

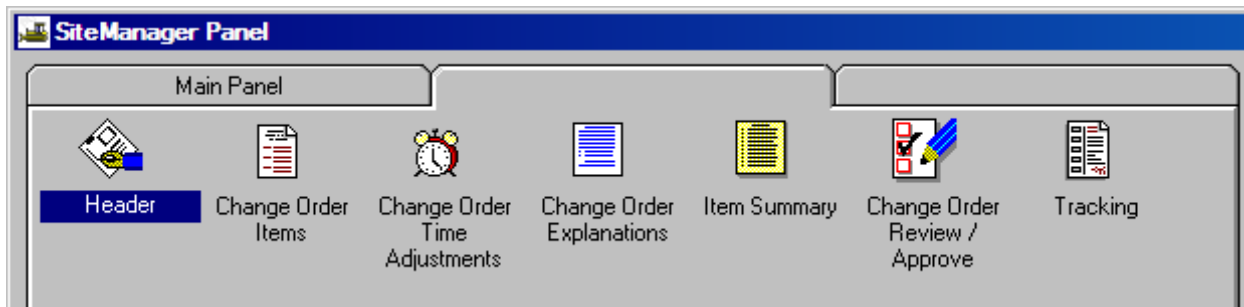
This section will explain how to view a change order header.



From the Main Panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**



“Double-click” **Header**.

**Select Contract and Change Order**

Selection

Contract ID  
Change Order

Find :

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
R -90003	99-9999977	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90004	99-9999966	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90007	99-9999988	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90011	99-9999999	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G

OK Cancel

“Double-click” on the appropriate **Contract ID**

**Select Contract and Change Order**

Selection

Contract ID R -90004  
Change Order

Find :

Change Order

CO Nbr	Type	Status	Description
001	CHANGE ORDER	Draft	Creating work
002	CHANGE ORDER	Draft	test obsolete items
003	CHANGE ORDER	Pending	Enter a Short Description of the Change Order
004	TIME EXTENTION AGREEMENT	Pending	Adding time to the contract

OK Cancel

“Double-click” on the appropriate **CO Nbr.**

**AASHTO SiteManager**

File Services Window Help

Header

Contract ID: R -90004 CO Number: 003

Tentative Verbal Approval Dates:  
Federal: 00/00/00 Local: 00/00/00

CO Created by: Update On: 02/26/09

Status: Pending Approval Level: Area Engineer

Description: Enter a Short Description of the Change Order

Reason Code: ERRORS & OMISSIONS, Design Related

CO Type: CHANGE ORDER

Functions: ☒ Overrun/Underrun ☐ Force Account  
☒ Extra Work ☐ Zero Dollar  
☐ Time Adjustment ☐ Final Quantity

Emergency Work ☒

Bid Contract Amt: \$658,493.35  
Current Contract Amt: \$658,493.35  
CO Amount: \$16,900.00

Reference to:  
Dispute: 1 **INDOT**

The **Header** window will open

Contract ID: R-90004	CO Number: 003	Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00	
CO Created by: Update		On: 02/26/09	
Status: Pending	Approval Level: Area Engineer		
Description: Enter a Short Description of the Change Order			
Reason Code: ERRORS & OMISSIONS, Design Related			
CO Type: CHANGE ORDER			
Functions: <input checked="" type="checkbox"/> Overrun/Underrun <input type="checkbox"/> Force Account <input checked="" type="checkbox"/> Extra Work <input type="checkbox"/> Zero Dollar <input type="checkbox"/> Time Adjustment <input type="checkbox"/> Final Quantity		<input checked="" type="checkbox"/> Emergency Work Bid Contract Amt: \$658,493.35 Current Contract Amt: \$658,493.35 CO Amount: \$16,900.00	
Reference to:			
Dispute: 1		INDOT	

**Contract ID:** is the unique identifier for the contract and is automatically populated.

**CO Number:** is the unique identification number assigned to the change order.

**Tentative Verbal Approval Dates Federal:** is the date that the Federal Highway Administration gave verbal approval for this Change Order.

**Tentative Verbal Approval Dates Local:** is the date that the Local Public Agency gave verbal approval for this Change Order.

**CO Created By:** is the person who composes the Change Order document

**ON:** is the date that the Change Order was created.

**Status:** is the current level of approval for the Change Order

**Approval Level:** is the highest level of authority required to approve the Change Order.

**Description:** is a short sentence describing the entire Change Order.

**Reason Code:** identifies the reason for the change to the Contract.

- **Errors & Omissions:** Errors and/or Omissions in the Contract Documents which prevents the contract from being constructed as intended.
- **Constructability:** Ability to be constructed.
- **Scope Changes:** A change in the project limits or design that revises the original intent of the Contract.
- **Changed Field Conditions:** Either an existing or new condition that could not have been reasonably foreseen by either INDOT or the Contractor prior to beginning the work.
- **Failed Material:** Material failures that result in penalties, reduced payment or replacement of items of work.
- **Incentive/Disincentive:** Monetary rewards or penalties added to a contract in addition to the normal Liquidated Damages clause.
- **Standards/Specs Change:** A change in the Contract Specifications as a result of a Department decision to initiate changes to active contracts on a Statewide basis.
- **Final Quantity Adjustment:** This is not utilized by INDOT.

**CO Type:** identifies the specific type of Change Order.

**Override Approval Rules:** will not be utilized by INDOT.

Contract ID: R-90003	CO Number: 004	Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00	
CO Created by: Fault, Ash		On: 09/13/06	
Status: Draft	Approval Level: Director, Division of Construction Manag		
Description: Additional Resurfacing per District Const. Engineer.			
Reason Code: SCOPE CHANGES, District/Subdistrict			
CO Type: CHANGE ORDER			
<input type="checkbox"/> Emergency Work			
Functions: <input checked="" type="checkbox"/> Overrun/Underrun <input type="checkbox"/> Force Account <input type="checkbox"/> Extra Work <input type="checkbox"/> Zero Dollar <input type="checkbox"/> Time Adjustment <input type="checkbox"/> Final Quantity		Bid Contract Amt: \$658,493.35 Current Contract Amt: \$671,041.85 CO Amount: \$23,180.00	
Reference to: Dispute: <input type="text"/>		INDOT	

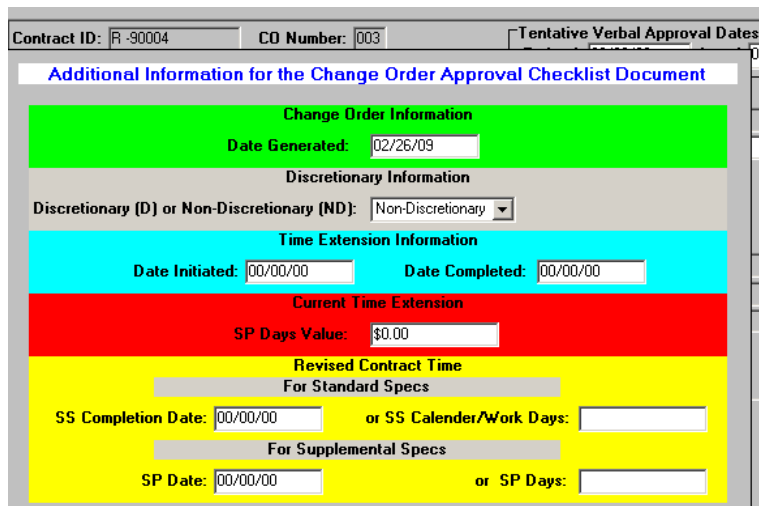
**Emergency Work:** will be checked to expedite the Change Order Review/Approval process.

**Functions:** this panel indicates the type of change order as it relates to the **Reason Code**.

- **Overrun/Underrun:** is used when quantity is added or subtracted from an existing contract item.
- **Extra Work:** is used when additional work items are required to complete the contract.
- **Time Adjustment:** is used when the timeframes need to be adjusted to reflect the changed time period for a milestone or contract.
- **Force Account:** is used for extra work in the contract for which the Contractor and the Department cannot reach agreement on the unit price prior to performing the work. A **Force Account** CO requires adding a new line item to the contract. Only one new line item is allowed per **Force Account** change order.
- **Zero Dollar:** is used for contract adjustments that will not affect the dollar amount of the contract. **Zero Dollar** change orders *cannot* include any other functions.
- **Final Quantity:** will not be utilized by INDOT. INDOT will use **Overrun/Underrun** Change Orders to balance quantities at the end of a contract.
- **Bid Contract Amount:** is the original contract dollar amount.
- **Current Contract Amount:** is the total to date Contract dollar amount, the **Bid Amount** plus Approved Change Orders.
- **CO Amount:** is the total dollar value for the specific Change Order.
- **Reference to Dispute:** indicates the associated Dispute number.

Documents are added to the change order Header as attachments.

“Click” on the Generic Field  located on the toolbar.



**Additional Information for the Change Order Approval Checklist Document** opens.

**Discretionary Information** field is required to be filled in and will not allow the Change Order to be completed without it.

To close “Click” on the **Generic Field**  located on the toolbar to close.

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## Attachments



The Attachment icon will appear without a paperclip if there are no attachments associated with the record in the currently opened window.



The Attachment icon will appear with a paperclip if attachments are associated with the record in the currently opened window.

See training document **A-2-11-1 Attaching a Document**

# Viewing Change Order Items

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and the 'CO Items' option is highlighted. The main window displays a form for a Change Order (CO) with the following fields:

- Contract ID: R-90004
- CO Number: 003
- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- CO Created by: Update
- On: 02/26/09
- Status: Pending
- Approval Level: Area Engineer
- Description: Enter a Short Description of the Change Order
- Reason Code: ERRORS & OMISSIONS, Design Related
- CO Type: CHANGE ORDER
- Emergency Work: ☒
- Functions: ☒ Overrun/Underrun, ☐ Force Account, ☒ Extra Work, ☐ Zero Dollar, ☐ Time Adjustment, ☐ Final Quantity
- Bid Contract Amt: \$658,493.35
- Current Contract Amt: \$658,493.35
- CO Amount: \$16,900.00
- Reference to: Dispute: 1
- INDOT

“Click” on **Services** located on the toolbar. “Click” on **CO Items**. “Click” on the **Open** button located on the toolbar.

The screenshot shows the 'Select Change Order Item' dialog box. It contains a 'Selection' section with fields for Contract ID (R-90004), Change Order (003), and Change Order Items. Below this is a 'Find' field and a 'Change Order' table.

CO Nbr	Type	Status	Description
001	CHANGE ORDER	Draft	Creating work
002	CHANGE ORDER	Draft	test obsolete items
003	CHANGE ORDER	Pending	Enter a Short Description of the Change Order
004	TIME EXTENTION AGREEMENT	Pending	Adding time to the contract

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

“Double-click” on the appropriate **CO Nbr**

**Select Change Order Item**

Selection

Contract ID: R-90004  
Change Order: 003  
Change Order Items

Find:

**Change Order Items**

Project Nbr	Catg Nbr	Project Item Nbr	Item Code	Description
9620710	0001	0016	401-07403	QC/QA-HMA, 3, 76, INTERMEDIATE, 19.0 mm
9620710	0001	0190	808-97643	BUZZ STRIPS

OK Cancel

“Double-click” on the appropriate **Project Item Nbr**

**AASHTO SiteManager**

File Edit Services Window Help

**Change Order Items**

Change Order Item New Contract Item

Cont ID: R-90004 CO Nbr: 003 Project Nbr: 9620710  
Project Line Item Nbr: 0190 Item Code: 808-97643  
Unit: Meter (SI) Unit Price: \$70.00000

Item and Supplemental Descriptions:  
BUZZ STRIPS  
Enter additional descriptive information here if appropriate

	Quantity	Amount
INDOT Contract Bid:	0.000	\$0.00
Approved Change Order:	0.000	\$0.00
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	120.000	\$8,400.00

☐ Force Account Item

The information for the item will appear in the new window.

- **Contract ID:** is the unique identifier for the contract.
- **CO Nbr:** is the unique identifier for the Change Order.
- **Project Nbr:** is the unique identifier for the Project Number
- **Project Line Item Nbr (Number):** is the unique identifier for the Line Item Number.
- **Item Code:** is the unique identifier associated to the **Line Item Nbr**.
- **Unit:** is the unit of measure associated with the **Line Item Nbr**.
- **Unit Price:** is the dollar amount per each unit that is associated with the **Line Item Nbr**.
- **Item and Supplemental Description:** **Item and Supplemental Description** is the complete description of the associated **Line Item Nbr**.
- **Change Order Item Description:** **Change Order Item Description** is to document the need for a specific item.

**Change Order Item**    New Contract Item

Cont ID: R-90004    CO Nbr: 003    Project Nbr: 9620710

Project Line Item Nbr: 0190    Item Code: 808-97643

Unit: Meter (SI)    Unit Price: \$70.00000

Item and Supplemental Descriptions:

BUZZ STRIPS

Enter additional descriptive information here if appropriate

	Quantity	Amount
<b>INDOT</b> Contract Bid:	0.000	\$0.00
Approved Change Order:	0.000	\$0.00
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
<b>This Change Order:</b>	120.000	\$8,400.00

☐ Force Account Item

- **Contract Bid:** **Contract Bid** is the original contract pay quantity and dollar amount for the associated **Line Item Nbr**.
- **Approved Change Order:** **Approved Change Order** is the pay quantity and dollar amount that are on Approved Change Orders for the associated **Line Item Nbr**.
- **Current Contract:** **Current Contract** is the total pay quantity and dollar amount that is available by adding both the **Contract Bid** amount and the **Approved Change Order** amount together for the associated **Line Item Nbr**.
- **Pending Change Order:** **Pending Change Order** is the pay quantity and dollar amount that are on change orders in the approval process but not yet approved for the associated **Line Item Nbr**.
- **This Change Order:** **This Change Order** is the pay quantity and dollar amount that are on this particular change order for the associated **Line Item Nbr**.

To view another CO item “click” on the open folder icon located on the toolbar.

**Select Change Order Item**

Selection

Contract ID: R-90004

Change Order: 003

Change Order Items

Find:

**Change Order Items**

Project Nbr	Catg Nbr	Projec tem Nb	Item Code	Description
9620710	0001	0016	401-07403	QC/QA-HMA, 3.76, INTERMEDIATE, 19.0 mm
9620710	0001	0190	808-97643	BUZZ STRIPS

OK Cancel

“Double-click” on the appropriate **Project Item Nbr**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Change Order Items**

Change Order Item    New Contract Item

Cont ID: R-90004    CO Nbr: 003    Project Nbr: 9620710



Project Line Item Nbr: 0016    Item Code: 401-07403

Unit: Megagram (SI) (Metr)    Unit Price: \$42.50000

**Item and Supplemental Descriptions:**

QC/QA-HMA, 3, 76, INTERMEDIATE, 19.0 mm

	Quantity	Amount	
<b>INDOT</b>			
Contract Bid:	1567.000	\$66,597.50	<b>This item is sub-contracted</b>
Approved Change Order:	0.000	\$0.00	
Current Contract:	1567.000	\$66,597.50	
Pending Change Order:	0.000	\$0.00	
<b>This Change Order:</b>	<b>200.000</b>	<b>\$8,500.00</b>	<input type="checkbox"/> Force Account Item

“Click” the **Close**  button located on the toolbar to return to the **Header**.  
 “Click” the **Close**  button located on the toolbar to exit the CO.

# VIEWING CHANGE ORDER TIME ADJUSTMENTS

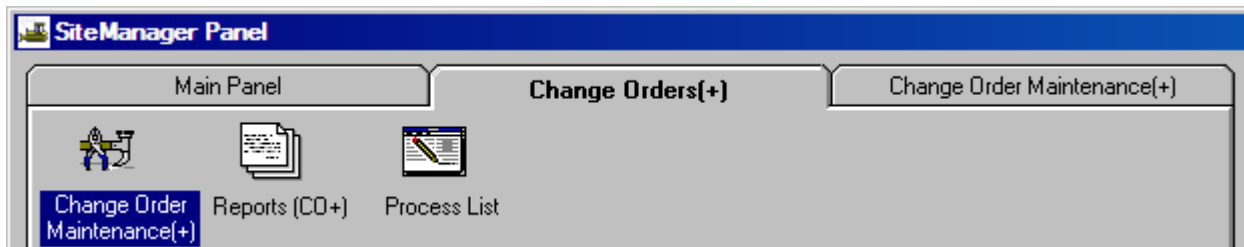
This section will explain how to view time adjustments made to a contract through a change order.

There are three types of time adjustments:

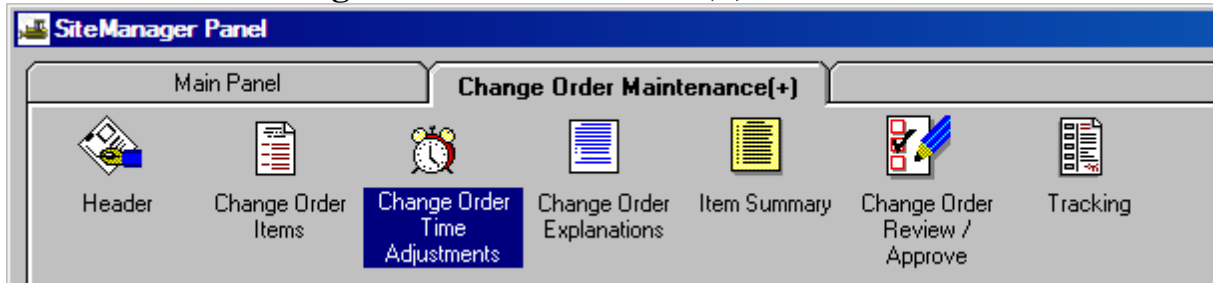
- Change in the Contract Completion Date-available only for Contracts with a Fixed Completion Date.
- Change in the number of days associated with a Contract-available for Contracts with a Work Day or Calendar Day completion.
- Change in the number of days associated with a Milestone-available for Contracts with a Work Days, Calendar Day, or Fixed Completion Date.



From the main panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**.



“Double-click” on **Change Order Time Adjustments**.

**Select Contract and Change Order**

**Selection**

Contract ID  
Change Order

Find :

**Contract ID**

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
R -90003	99-9999977	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90004	99-9999966	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90007	99-9999988	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R -90011	99-9999999	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G

OK Cancel

The **Contract and Change Order Selection Panel** will appear with the following information:

If you have not previously selected a contract, “double-click” on the appropriate **Contract ID**.

**Select Contract and Change Order**

**Selection**

Contract ID R -90004  
Change Order

Find :

**Change Order**

CO Nbr	Type	Status	Description
001	CHANGE ORDER	Draft	Creating work
002	CHANGE ORDER	Draft	test obsolete items
003	CHANGE ORDER	Pending	Enter a Short Description of the Change Order
004	TIME EXTENTION AGREEMENT	Pending	Adding time to the contract

OK Cancel

“Double-click” on the appropriate **CO Nbr**.

**AASHTO SiteManager**  
File Services Window Help

**Header**

Contract ID: R-90004 CO Number: 004 Tentative Verbal Approval Dates:  
Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 02/27/09

Status: Pending Approval Level: Area Engineer

Description: Adding time to the contract

Reason Code: CONSTRUCTABILITY, Staging Related

CO Type: TIME EXTENTION AGREEMENT

Emergency Work ☐

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☒ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35  
Current Contract Amt: \$658,493.35  
CO Amount: \$0.00

Reference to:  
Dispute:  **INDOT**

The Header for the **Time Adjustment** change order will open.

**AASHTO SiteManager**  
File Services Window Help

Choose Keys Ctrl+Alt+K  
Generic Fields Ctrl+Alt+G  
Attachments  
Process Status  
CO Items Ctrl+Shift+I  
**CO Time Adjustments Ctrl+Shift+M**  
Change Order Tracking Ctrl+Shift+T

Contract ID: R-90004 CO Number: 004 Tentative Verbal Approval Dates:  
Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 02/27/09

Status: Pending Approval Level: Area Engineer

Description: Adding time to the contract

Reason Code: CONSTRUCTABILITY, Staging Related

CO Type: TIME EXTENTION AGREEMENT

Emergency Work ☐

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☒ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35  
Current Contract Amt: \$658,493.35  
CO Amount: \$0.00

Reference to:  
Dispute:  **INDOT**

“Click” on **Services** located on the toolbar. “Click” **CO Time Adjustments**.

Contract ID: R-90004 Change Order Nbr: 004

Adjusted Contract or Milestone	Adjustment Days	Adjustment Date	Explanation
Contract	10	00/00/00	Contract time adjustment due to Utility work delay.

☐ For Milestone: 
☒ For Contract Completion

Time Adjustment Days: 
 Adjusted Completion Date:

Explanation:


In the top panel summary information concerning the **Adjusted Contract or Milestone**, **Adjustment Days**, **Adjustment Date**, and **Explanation** will be displayed.

**Adjusted Contract or Milestone:** **Adjusted Contract** will indicate the appropriate Contract that has had time adjusted to it, while the **Milestone** will indicate the appropriate **Milestone** that has had time adjusted to it.

**Adjustment Days:** **Adjustment Days** will indicate the number of days adjusted to either the appropriate **Contract** or **Milestone**.

**Adjustment Date:** **Adjustment Date** will indicate the revised completion date for either the **Contract** or **Milestone**.

**Explanation:** **Explanation** will give a general reason for the time adjustment to either the **Contract** or **Milestone**.

“Click” the **Close**  button located on the toolbar to exit the **Change Order Time Adjustments** window.

“Click” the **Close**  button located on the toolbar to exit the Change Order.

## Viewing a Change Order Time Adjustments

### Exercise E-3-2-T

#### Group Exercise

This exercise will demonstrate how to view an existing Change Order Time Adjustment.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Orders (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Change Order Time Adjustments** icon

“Double-Click” on appropriate **Contract ID**: R90003

“Double-Click” on appropriate **CO Nbr**: 2

“Click” on **Services** located on the toolbar

“Click” on CO Time Adjustments

View **Change Order Time Adjustments** information.

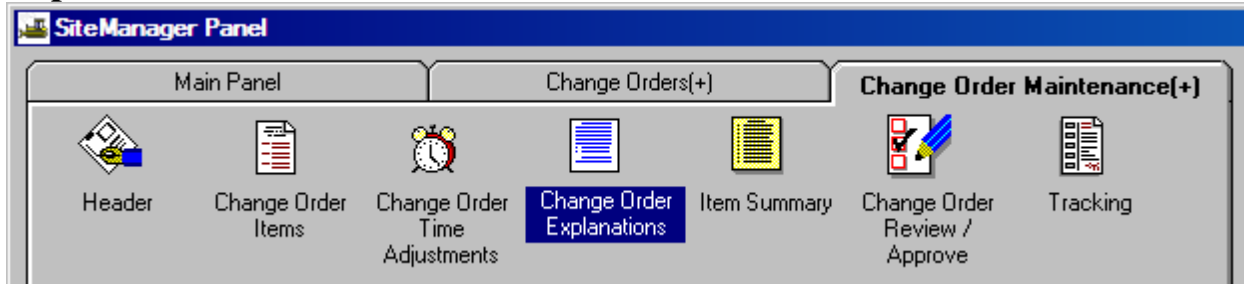
What is the adjustment associated to: Contract or Milestone?

“Click” on the **Close** button located on the Toolbar twice to exit the change order.

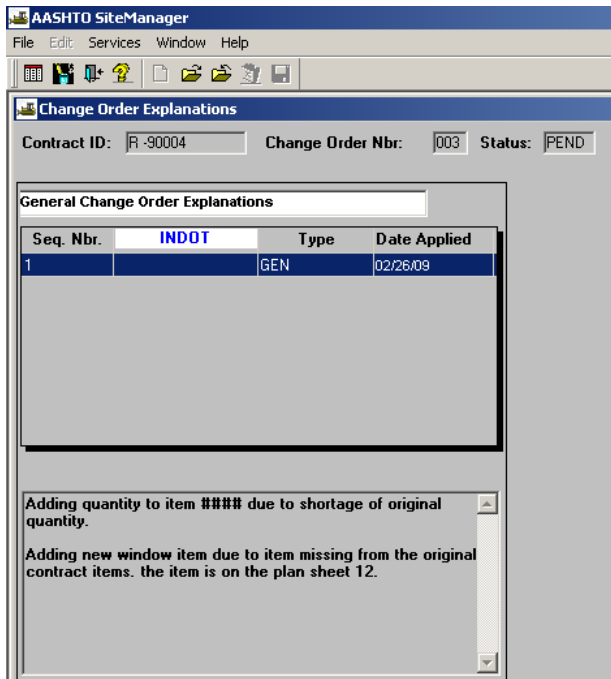
# Viewing Change Order Explanations

This section will explain how to view an explanation for a change order.

If the change order was open it is not necessary to navigate from the Main Panel just close out of the change order and “double-click” on **Change Order Explanation** icon.



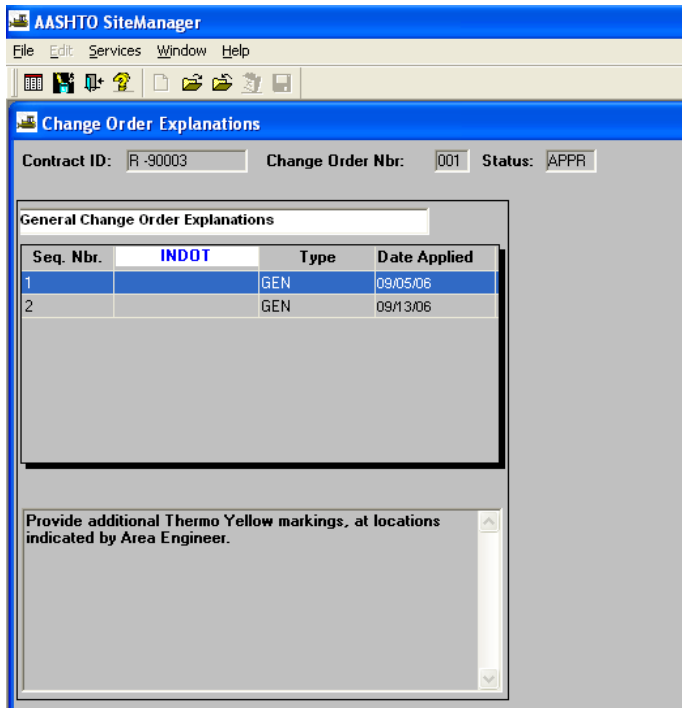
“Double-click” on **Change Order Explanations**.



**General Change Order Explanations:** to document the need for the change order.

There may be multiple Change Order Explanations listed in the top panel.

“Click” on each type of explanation to view all the explanations on the Change Order.



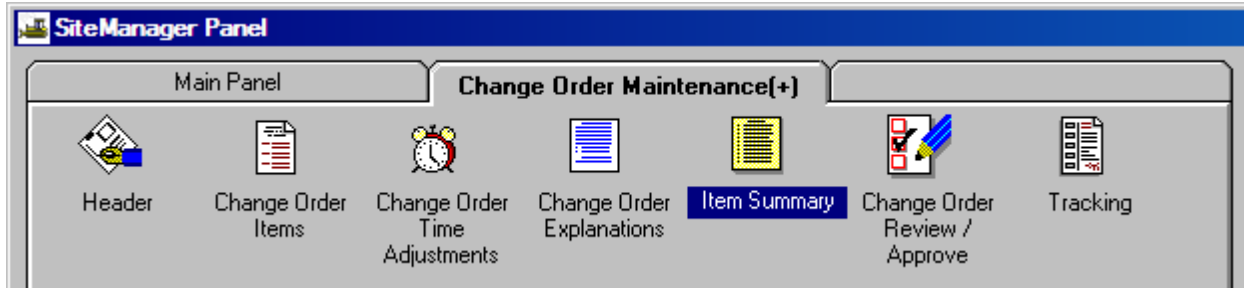
An explanation may be associated to multiple items.

“Double-click” each **Seq. Nbr.**

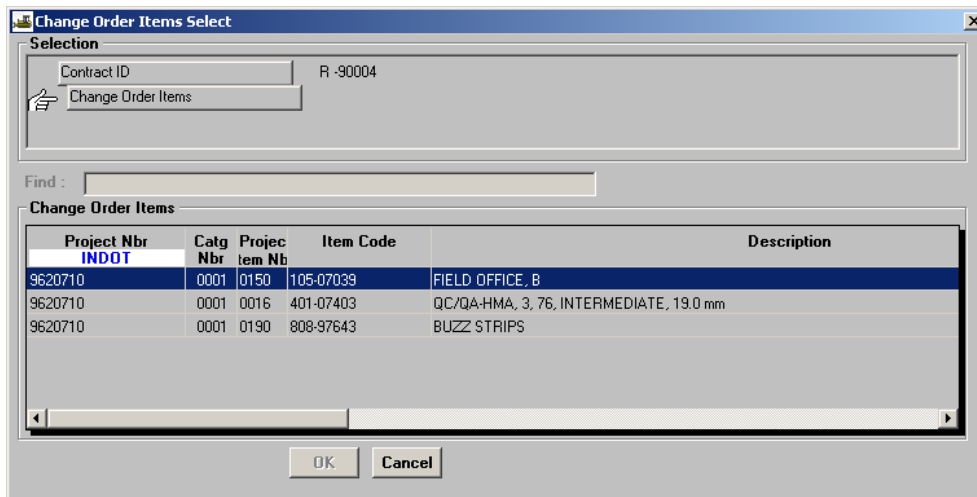
“Click” the **Close**  button located on the toolbar.

# Viewing the Item Summary

This section will explain how to view the details of the Items in all Change Orders for the contract in any status (Draft, Pending, or Approved).



“Double-click” on **Item Summary**.



The summary list of all Change Order items will appear.

“Double-click” on the appropriate **Project Item Nbr.** to view the item summary.

**AASHTO SiteManager**  
File Services Window Help

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**Item Summary**

Contract ID: JR-90004 Proj Nbr: 9620710 Line Item Nbr: 0150  
 Item Code: 105-07039 Unit: MOS Unit Price: 0  
 Item Description: FIELD OFFICE, B  
 Supp Desc1:  
 Supp Desc2:

	Quantity	Amount
Contract Bid:	0	\$0.00
Approved Change Order:	0	\$0.00
Current Contract:	0	\$0.00
Pending Change Order:	0	\$0.00

% Change To Date:

CO Nbr	Quantity	Unit Price	Amount	Status
001	111.000	\$0.00	\$0.00	DRAF

The information associated to the selected item is available to review. This information includes;

- **Contract ID:** is the Contract that is associated to the CO item.
- **Proj Nbr:** is the Project Number associated to the Change order item
- **(Project) Line Item Nbr:** is the unique identifier for the **Line Item Nbr**
- **Item Code:** is the unit of measure associated with the item
- **Unit:** is the unit of measure associated with the item.
- **Unit Price:** is the dollar amount per each unit that is associated with the item
- **Item Description Item** and **Supp Desc 1 and 2** is the complete description of the associated **Change Order Line Item Nbr.**
- **Contract Bid:** is the original contract pay quantity and dollar amount for the associated **Line Item Nbr.**
- **Approved Change Order: Order** is the pay quantity and dollar amount that are on Approved Change Orders for the associated **Line Item Nbr.**
- **Current Contract:** is the total pay quantity and dollar amount that is available by adding both the **Contract Bid** amount and the **Approved Change Order** amount together for the associated **Line Item Nbr.**
- **Pending Change Order-** is the pay quantity and dollar amount that are on change orders in the approval process but not yet approved for the associated **Line Item Nbr**
- **% Change To Date-** The percent of change to the contract for this Project Line Item computed on an approved change order.

NOTE: the quantities associated to a change order in draft status will not be included in the quantities in the top panel.

**Item Summary**

Contract ID: R-90003    Prj Nbr: 9620710    Line Itm Nbr: 0007

Item Code: 203-02000    Unit: m3    Unit Price: 20.00000

Item Description: EXCAVATION, COMMON

Supp Desc1:   
 Supp Desc2:

	Quantity	Amount
Contract Bid:	3505.000	\$70,100.00
Approved Change Order:	100.000	\$2,000.00
Current Contract:	3605	\$72,100.00
Pending Change Order:	0	\$0.00


% Change To Date: 2.85306

CO Nbr	Quantity	Unit Price	Amount	Status
001	100.000	\$20.00	\$2000.00	APPR

The bottom Panel lists the changes made to the work item by individual change order and the value of each change.  
Also the status of the changes is noted as well.

“Click” the **Open**  button on the toolbar to proceed to another work item.

Or

“Click” on the **Close**  button on the toolbar to exit **Item Summary**.

## Viewing the Item Summary

### Exercise E-5-T Group Exercise

This exercise will demonstrate how to access the information contain in the Change Order Item Summary.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Order (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Item Summary** icon

“Double-Click” on appropriate **Contract ID**: R90003

“Double-Click” on appropriate **Item Code**: 0007

Review information about that item

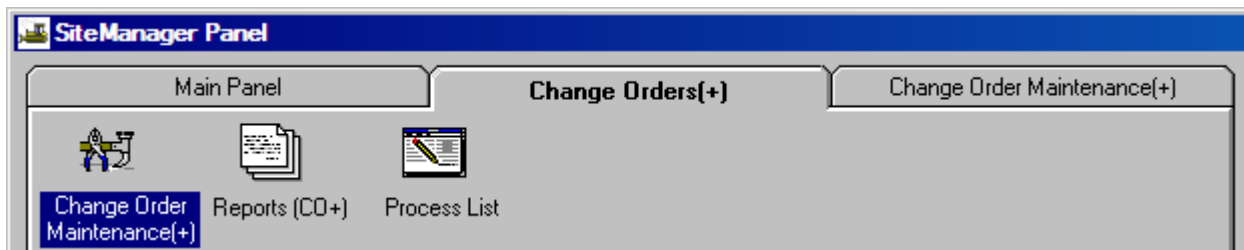
“Click” on **Close** located on the Toolbar.

# Tracking a Change Order

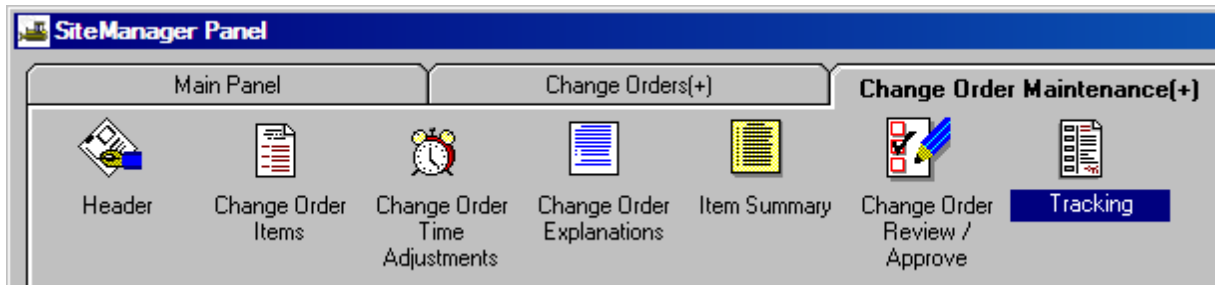
This section will explain how to track the reviewing and approval process of a change order.



“Double-click” on **Change Orders (+)** located on the Main Panel.



“Double-click” on **Change Order Maintenance (+)**.



“Double-click” on **Tracking**.

**ChangeOrder Tracking Select**

**Selection**

Contract ID: R-90003  
Change Orders: 001, CO

Find:

**Contract ID**

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
dea90004	99-9999966	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
MT-DOCS	00-0000000	MT_DOCS	ACTV	C094	900			MISC MATERIALS & T
R-90003	99-9999977	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R-90004	99-9999966	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R-90007	99-9999988	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G
R-90011	99-9999999	STP 3387005	ACTV	C087	660			DN SR 261 AT OAK G

OK Cancel

“Double-click” on the appropriate **Contract ID**.  
This step will be skipped if a contract is already open.

**ChangeOrder Tracking Select**

**Selection**

Contract ID: R-90003  
Change Orders:

Find:

**Change Orders**

CO Nbr	Type	Status	Description
001	CHANGE ORDER	Approved	Provide additional Thermo Pavement Markings, Solid, Yellow
002	TIME EXTENSION AGREEMENT	Pending	Contract adjustment for time due to INDOT interference with
003	CHANGE ORDER	Draft	Quantity Discrepancies with contractor
004	CHANGE ORDER	Draft	Additional Resurfacing per District Const. Engineer.
005	FORCE ACCOUNT	Pending	Replacing Manhole Lids and Frames
006	CHANGE ORDER	Draft	3.5 KM of additional resurfacing

OK Cancel

“Double-click” on the appropriate **Change Order Nbr**.  
This step will be skipped if a change order is already open.

**AASHTO SiteManager**

File Services Window Help

**Tracking**

CO Header CO Tracking List

Contract ID: R-90003 Change Order Nbr: 002

Sent Date	Name	Action	Date	Recommendation	Remarks
11/08/06	Hanna, Polly	Approval	00/00/00	Action Pending	
11/08/06	Farmer, Frank	Approval	00/00/00	Action Pending	
09/13/06	Fault, Ash	Review	09/13/06	Approve	Enter any corrections, additions, exceptions, or questions here. They will become part of the "paperless" trail

“Click” on the **CO Tracking List** tab.

This window will show the **Names** of the reviewers and/or approvers associated to the change order, the **Action** the reviewer took (review or approval), the **Date** the review or approval was made, **Recommendation**, and **Remarks**.

**AASHTO SiteManager**

File Services Window Help

**Tracking**

CO Header CO Tracking List

Contract ID: R-90003 Change Order Nbr: 002

Sent Date	Name	Action	Date	Recommendation	Remarks
11/08/06	Hanna, Polly	Approval	00/00/00	Action Pending	
11/08/06	Farmer, Frank	Approval	00/00/00	Action Pending	
09/13/06	Fault, Ash	Review	09/13/06	Approve	Enter any corrections, additions, exceptions, or questions here. They will become part of the "paperless" trail

#### NOTES:

1. If a requested review or approval has not been made, the comment “**Action Pending**” will appear in the **Recommendation** column.
2. Changing from Pending Status to Draft Status will stop the action of a change order. The Change Order is effectively recalled.
3. Changing the Status back to Pending will reinitiate the approval/review process.

“Click” the **Close**  button located on the toolbar.

## Tracking a Change Order

### Exercise E-9-T Group Exercise

This exercise will demonstrate how to use the Change Order Tracking function.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Orders (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Tracking** icon

“Double-Click” on appropriate **Contract Id**: R90003

“Double-Click” on appropriate **CO Nbr**: 1

Review **CO Header** information

“Click” on **CO Tracking** List Tab

Was this Change Order sent for Review? \_\_\_\_\_

“Click” on **Close** located on the Toolbar.